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ABSTRACT

Proposed training procedures and materials, and participants' questions on the use of the Southwest Regional Laboratory's (SWRL) student monitoring system data base in the Instructional Management System (IMS) are described. The training sessions were undertaken because IMS Version 3 requires classroom teachers to use special materials and procedures to communicate data about students to the system for further processing. In addition to descriptive information on the pilot training program, recommendations for further revisions are included. (DGC)

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NO: TN 5-72-20

TITLE: USER TRAINING FOR THE 1971-72 TRYOUT OF IMS - VERSION 3

AUTHOR: Gordon L. Gibbs

ABSTRACT

Training procedures, sample materials, and participants' questions are presented with recommendations regarding desirable revisions.

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USER TRAINING FOR THE 1971-72 TRYOUT OF IMS - VERSION 3

INTRODUCTION

Purpose

Although the use of IMS in conjunction with an instructional program (e.g., FYCSP, LMS/HR1, etc.) does not alter instructional procedures used by teachers, it does require the use of special materials and procedures to communicate pupils' criterion exercise responses to the system for processing. The purpose of the training sessions was to instruct participating teachers in the proper use of these special materials and procedures.

Participants

A total of 81 teachers in four districts participated in the training sessions. Of this total, 21 teachers were using FYCSP and 65 were using LMS in conjunction with HR1, HR2, HR3, or MBS.[1]

Scheduling

Because the IMS materials and procedures for use in conjunction with FYCSP are different from those for use in conjunction with LMS, separate training sessions were held for FYCSP teachers and LMS teachers. In addition, the LMS/HR3 training was combined with the IMS/HR3 training. Table 1 presents the dates on which training sessions were held.

METHOD

General Procedures

The general training procedures for each session were the same. A verbal overview of IMS, accompanied by an overhead transparency, included

[1] The total number of classrooms is greater than the number of teachers because some teachers were using more than one instructional program.

Table 1

Schedule of IMS Training Sessions

District	Program	Date
1	LMS/HR1	Jan. 6, 1972
	LMS/HR2	
	LMS/MBS	
	LMS/HR3	Feb. 24, 1972
2	FYCSP	Jan. 24, 1972
	LMS/HR1	Jan. 20, 1972
	LMS/HR2	
	LMS/MBS	
	LMS/HR3	Feb. 23, 1972
3	FYCSP	Dec. 2, 1971
	LMS/HR1	Dec. 3, 1971
	LMS/HR2	
	LMS/MBS	
	LMS/HR3	Feb. 23, 1972
4	FYCSP	Jan. 14, 1972
	LMS/HR1	Jan. 11, 1972
	LMS/HR2	
	LMS/MBS	
	LMS/HR3	Feb. 28, 1972

a definition of IMS, a statement of its purposes, and a description of what and how IMS would add to the basic instructional system.

Following the overview, an example of each material component, along with a set of directions for its use, was distributed, and the purpose and procedures for its use were described. In appropriate instances, the participants were given an opportunity to practice the proper use of a component.

Each session concluded with a question and answer period during which participants raised questions regarding the use of any of the components. This time was also used to obtain certain initial data from the participating teachers.

IYCSP Training

Procedures and Materials. The general sequence described in the preceding section was followed. The first component to be presented following the overview was the IMS Class Record Sheet.* The purpose of the IMS Class Record Sheet (i.e., to establish and maintain an accurate, up-to-date list of participating pupils in the class) was stated. This statement of purpose was followed by a step-by-step description of its use, which included the following points:

1. Identifying information (i.e., teacher, district, school, grade level, and class) will be pre-printed by SWRL.
2. Pupil names can be listed in any order convenient to the teacher so long as no lines are left blank between names.
3. Indication of a group designator is completely at the discretion of the teacher.
4. When a new pupil's name is added, it must be recorded on the next available blank line.
5. If two or more new pupils are added on the same day, they must be recorded in alphabetical order.
6. If any pupil leaves, his name must be crossed off the IMS Class Record Sheet. However, that line does not then become available for recording a new pupil's name.
7. The teacher should retain the original (white) copy of the IMS Class Record Sheet and mail the carbon (yellow) copy to SWRL.

* Sample materials are on file in Activity 508 archives.

The second component was the IMS Criterion Exercise Sheet. Each of the two functions (recording responses and deleting pupils) for which this sheet could be used was presented separately.

The following points were covered concerning its use by pupils to record their responses to the criterion exercise items:

1. The major differences between it and the regular criterion exercise sheets were pointed out. These were: (1) it is a single 8½ x 11 inch sheet rather than a four page "booklet"; (2) there are ten items per side rather than five; and (3) pupils indicate their response by completely filling in the box under the stimuli rather than marking the box with an X.
2. The sheets must be prepared by the teacher before administering the criterion exercise. This is accomplished by: (1) recording the pupil's name on the sheet, (2) darkening the boxes above the words PUPIL CODE on the IMS Criterion Exercise Sheet that correspond to the numbers in the column on the IMS Class Record Sheet labeled PUPIL CODE and on the same line as the pupil's name.
3. Both sides of the sheet must be marked with the appropriate pupil code, but the name need be recorded only on side 1.
4. Both teachers and pupils must use #2 lead pencils to mark the IMS Criterion Exercise Sheet.
5. New direction cards for administering the criterion exercises would be provided. These directions are the same as the original

ones except the wording has been changed to reflect the need to mark the boxes by completely filling them in.

6. After administering the criterion exercise for a unit, the pupils' response sheets should be sent to SWRL.

Participants were then given the opportunity to prepare two sheets using the first and third names on the sample Class Record Sheet.

The use of the IMS Criterion Exercise Sheet to delete a pupil was presented next, emphasizing the following points:

1. Side 1 of the sheet should be prepared in the same manner as it was to administer the criterion exercise to the pupil; side 2 to be ignored.
2. The box below the word DELETE should be darkened.
3. The sheet should not have any item responses marked.
4. The sheet should be sent to SWRL either separately or along with a set of pupil response sheets.

Following this presentation the participants were given the opportunity to prepare a sheet that would delete the pupil from the sample IMS Class Record Sheet.

The third component to be presented was the FYCSP Practice Criterion Exercise. The following points were discussed:

1. The Practice Criterion Exercise is designed to acquaint pupils with the new format and marking requirements.
2. Its content was selected to place a premium on pupils' marking behavior rather than their selection of the correct response; it is not a test.

3. It should be used at least one day before the administration of the first actual criterion exercise.
4. The script contained in the directions is only suggested wording. Teachers may alter the wording as they see fit provided the basic ideas remain the same.
5. If the quality of pupils' marks deteriorate during the year, the teacher should repeat the Practice Criterion Exercise.

The final component to be presented was the IMS Class Identification Sheet. The Class ID Sheet serves two functions, to identify a set of Criterion Exercise Sheets and to add new pupil names to a teacher's class record.

Using the Class ID Sheet to identify a set of Criterion Exercise Sheets, the following points were emphasized:

1. Each teacher's Class ID Sheet has been specially precoded for her use. Therefore, they should not be exchanged or duplicated.
2. Each time a set of Criterion Exercise Sheets is ready to be sent to SWRL, the teacher should print the date on which the criterion exercise was administered in the appropriate boxes on the ID Sheet. The teacher need not complete the coding grid below these boxes.
3. The Class ID Sheet must accompany the Criterion Exercise Sheets when they are sent to SWRL.
4. Only one Class ID Sheet is required even if different programs and units are included in a set of data for a class.

Using the Class ID Sheet to add new pupil names to a teacher's class record was then discussed. The following points were emphasized:

1. The same restrictions enumerated above apply to this use of the Class ID Sheet.
2. To add a new pupil the teacher should:
   - Record the date on which he was enrolled in the class.
   - Darken the box indicated by the arrow.
   - Print the pupil's name, last name first, in the boxes, leaving a blank between the first and last name.
   - Send the sheet to SWRL.
3. The Class ID Sheet cannot serve both functions of pupil updating and class identification simultaneously.
4. One Class ID Sheet must be used for each pupil to be added.
5. Used as an updating form, the Class ID Sheet need not accompany a set of criterion exercises, but may be sent separately to SWRL at any time.

The presentation of the Class ID Sheet concluded the formal part of each training session. The question and answer period followed.

Participants' Questions. The following questions were raised by participants. The number in parentheses is the number of training sessions in which that question (or one similar to it) arose.

1. Is there any particular order in which pupils' names must be listed on the Class Record Sheet? (1)
2. When should the criterion exercise be encoded? (1)

3. When should we begin to use the IMS Criterion Exercise forms; i.e., how soon? (2)
4. When should the Practice Criterion Exercise be given? (1)
5. Can both the regular and the IMS Criterion Exercise be given for the same unit? (2)
6. How will SWRL know on which line of the Class Record Sheet a new pupil's name has been recorded? (1)
7. How does a pupil change a mark? (3)
8. What should we do if a pupil transfers from one class to another within a school? (1)
9. Will we get the Criterion Exercise Sheets back? (1)
10. Should we wait until we have a complete set of criterion exercises for an entire class before sending them to SWRL? (2)
11. What information will be contained in the reports that we do not already have by hand scoring the criterion exercises? (3)
12. How long will it take to get the information back to us? (3)
13. Should we retest on units already covered? (1)
14. How do we treat absentees? (1)
15. Should pupils who are having difficulty with FYCSP participate in IMS? (2)
16. How do we order additional materials? (1)

LMS Training (HR1, HR2, and MBS)

Procedures and Materials. With the exception of one additional component, the Pupil List, the sequence followed was the same as that for FYCSP.

The IMS Class Record Sheet for use with LMS programs differs from the one for use with FYCSP in that the pupil code is replaced by a pupil list number. There is no difference, however, in the manner in which the two sheets are used; hence, the directions and presentations were the same.

Following the IMS Class Record Sheet, the Pupil List was presented. The purpose of the Pupil List, to establish a one-to-one correspondence between names on the Class Record Sheet and pre-determined rows on the Criterion Exercise Record Sheet, was explained and the following points were emphasized:

1. On each Pupil List, the pupil name on each line must be the same as that on the corresponding line of the Class Record Sheet.
2. Procedures for recording names initially, for adding names to, and for deleting names from the Pupil List are the same as those for the Class Record Sheet.
3. The Pupil List is a permanent device for use by the teacher and should not, therefore, be sent to SWRL.

Following the presentation of the Pupil List, the IMS Criterion Exercise Record Sheet was presented. Its use in conjunction with the Pupil List was discussed, emphasizing the following procedures:

1. Each time a new Criterion Exercise Record Sheet is used with a Pupil List, the Pupil List number must be encoded.
2. If a pupil responds correctly to an item the response box for that item is not marked; if a pupil responds incorrectly, the box is marked.

3. The TESTED box must be marked for each pupil to whom the criterion exercise is given.
4. Any number of pupils may be tested at a time so long as a new Criterion Exercise Record Sheet is used whenever the Pupil List changes.
5. If a pupil is to be deleted, a Criterion Exercise Record Sheet is coded to indicate the Pupil List number on which the pupil's name appears, and the DELETE box in the appropriate row is darkened.
6. After administering the criterion exercise for a unit to a group of pupils the Criterion Exercise Record Sheets should be sent to SWRL.

Participants' Questions. Following the presentation of the Class ID Sheet the initial data collection forms were distributed and participants were given the opportunity to raise questions. The following questions were asked:

1. Once a pupil has been deleted, must the DELETE box continue to be marked on subsequent units? (2)
2. If I use two instructional programs in the same class will I have to treat them as two separate classes? (1)
3. How many pupils should we test before sending the sheets to SWRL? (1)
4. What kind of information will be contained in the reports? (3)
5. How long will it take to get the information back to us? (3)
6. What do we do with the materials we are now using? (1)

7. When should we begin using the IMS materials? (1)
8. Should we list all pupils on the Class Record Sheet or only those that are using the LMS materials? (1)
9. I am using HR2 with third grade pupils. Will that make any difference? (1)
10. Can we erase marks? (1)

HR3 Training

Procedures and Materials. For HR3 the LMS training and the IMS training were combined into one session during which the presentation of the LMS materials and procedures was followed by a presentation of those for IMS. The IMS portion of the training was most similar to that for FYCSP.

Presentation of the Class Record Sheet was identical to that for FYCSP. This was followed by a presentation of the IMS Criterion Exercise Sheet for HR3. With the exception that teachers were reminded to instruct pupils to mark their responses on the IMS answer sheet and not on the LMS "booklet," directions for using the IMS Criterion Exercise Sheet were the same as those for the FYCSP form. The presentation of the Class ID Sheet for HR3 was also the same as that for FYCSP.

Participants' Questions. Following the formal presentation of the IMS components the teachers were given the opportunity to ask questions. The following questions were asked:

1. After a pupil's name has been crossed off the Class Record Sheet will his number (pupil code) be reassigned? (1)

2. Can pupils write their own names on the Criterion Exercise Sheets? (1)
3. Where on the Criterion Exercise Sheets may we hand score them? (1)
4. What does SWRL do with the Criterion Exercise Sheets? (1)
5. Why don't you have scannable forms for the auxiliary exercises? (2)
6. When I use the Class ID Sheet to add a pupil to the class records, why do I have to record the date? (1)

DISCUSSION

General Comments

Presenting each component separately posed some difficulties, especially when two or more components are interdependent. For example, explaining the Pupil Code on the Class Record Sheet for FYCSP was difficult when the participants had not yet been introduced to the Criterion Exercise Sheet on which the Pupil Code is actually used. In addition, especially with large groups of trainees, distributing the sample components individually, just prior to their presentation, was time consuming.

Although participants were told that there would be a question and answer session following the presentation, many questions were raised and answered during the presentation of the components. Generally, only questions regarding report content, turnaround time, and future development were raised during the question and answer session.

Gathering the initial data directly from the teachers at the conclusion of the training session proved far superior to obtaining it from office personnel prior to the training session.

FYCSP

The IMS materials for use with FYCSP seemed to be well received by the participating teachers. No objections to the additional clerical work were raised, nor did any of the teachers express doubts about the ability of kindergarten pupils to use the scannable answer sheets.

With the exception of the explanation of the Pupil Code, the presentation of the components was straightforward and progressed smoothly from one component to the next. The updating procedures, adding or deleting a pupil name, were the most difficult for the participants to understand.

LMS (HR1, HR2, and MBS)

Again, the IMS materials were well received by the teachers, although there was some initial confusion regarding how SWRL would identify individual pupil's scores when no names appear on the Criterion Exercise Sheets. In addition, some teachers questioned the value of IMS since they would have to continue to hand score the criterion exercises.

As with FYCSP, the updating procedures were the most difficult for the participants to understand. Most of the difficulty centered around the question of how SWRL would know on which line of the Class Record Sheet a new pupil's name has been recorded. In some cases this was not a matter of concern, but was merely an expression of curiosity.

LMS (HR3)

Combining the IMS training with the LMS training created two problems. First, the session was excessively long. It appeared that the participants had had enough for one session after the LMS training was complete. Second, the fact that participants were not familiar with the LMS procedures made it more difficult for them to understand the IMS procedures. Adding to the problem was the fact that some of the components in LMS and IMS have similar names (e.g., LMS Class Record Sheet and IMS Class Record Sheet).

Again, the updating procedures gave rise to the most questions. Contrary to expectations, however, the teachers were unanimous in their belief that third grade pupils would be able to use the separate answer sheets successfully.

RECOMMENDATIONS FOR REVISION

Based upon the observations made during the training sessions, the problems encountered during training, and the questions raised by the trainees, the following recommendations regarding training materials and procedures are made:

1. The use of a slide/tape presentation to introduce the trainees to:
   - the purpose of IMS
   - the component materials of IMS
   - the operational flow of IMS

2. The use of a training package that contains all of the materials to be discussed during training, including:
   . Class Record Sheet
   . Pupil Lists (LMS only)
   . Criterion Exercise Sheets
   . Practice Criterion Exercise (FYCSP only)
   . Class ID Sheet
   . Output Reports
3. The development of an IMS teacher's manual to contain a complete description of the purpose, materials, and procedures. Include also a list of all error messages generated as part of the output reports, the conditions that could cause the message, and the corrective action (if any) that should be taken.
4. The continued use of the special data collection form to gather initial data at the conclusion of the training session.
5. The separation of IMS training sessions from those for LMS.
6. The renaming of some of the IMS components so that they are not confused with any of the LMS components.